

ISO 20K

Word from the Front Lines

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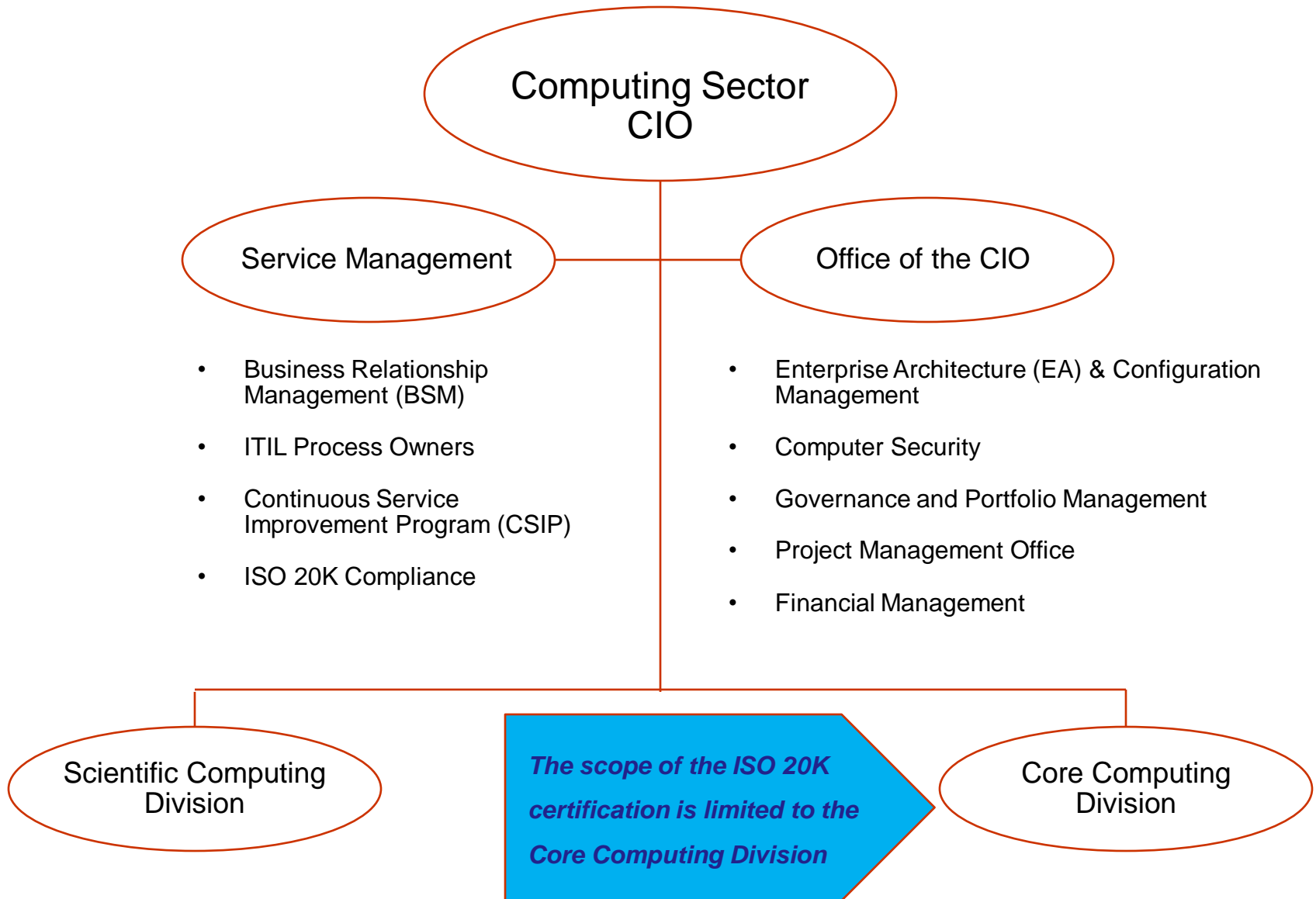
Agenda

- Service Management at Fermilab
- ISO 20K Missions and Status
- Lesson Learned
- The Light at the end of the ISO 20K Tunnel
- Q&A

ITSM, ISO 20K, & ITIL...*a quick touchpoint*

- Information Technology Service Management (**ITSM**): A broad reference to the market and practices which enable the support and delivery of IT services, either as an internal or external service provider.
- The IT Infrastructure Library (**ITIL**) is a codified set of best practices and a process framework for support and delivery of IT services. ITIL informs adopters of what “should” be done.
- **ISO/IEC 20000 (ISO 20K)** is an international standard for IT Service Management for which an organization can be assessed and certified. ISO 20K informs adopters of what “shall” be done.

Service Management at Fermilab

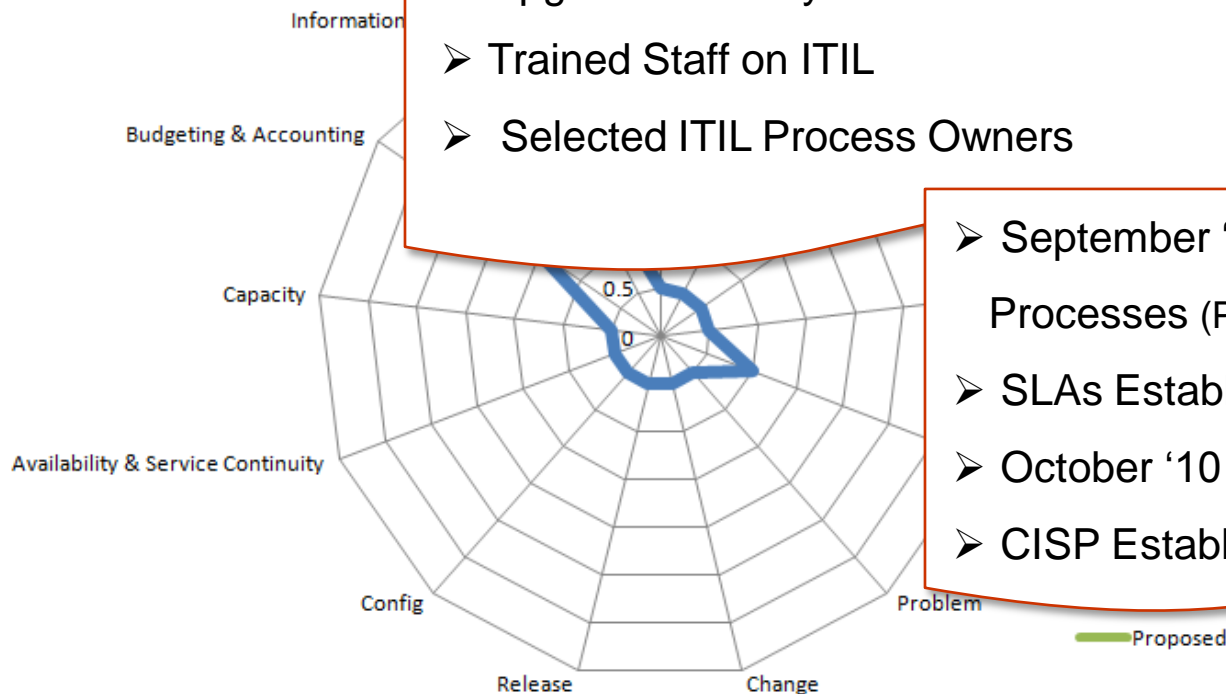


ISO 20K Project Snapshot

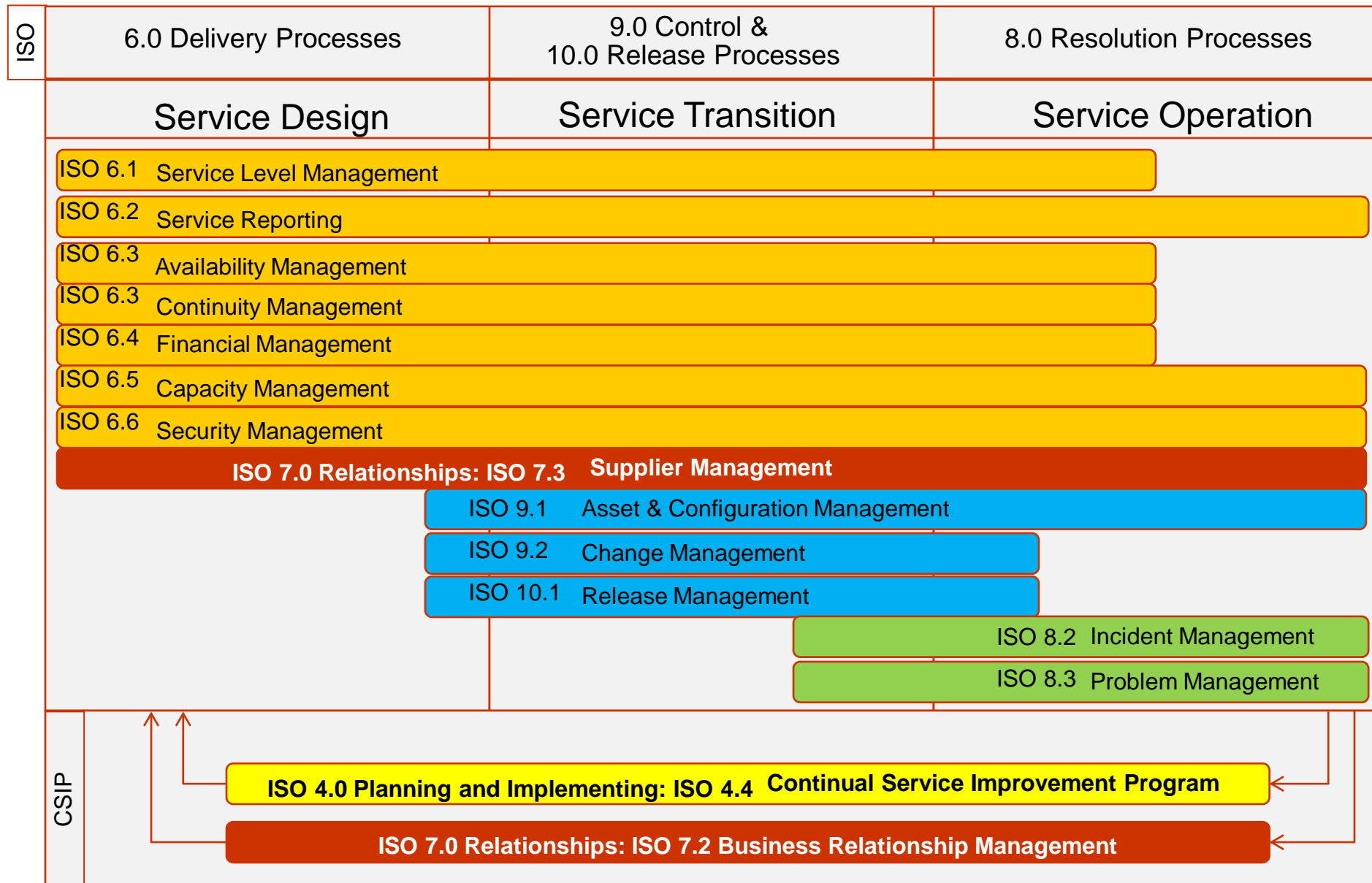
- Project Driven by Lab Consolidation
- Summer '09, Performed ISO 20K Assessment
- Engaged ITIL Consultants to Accelerate Implementation

- Feb '09 Begin ISO 20K Implementation
- Upgrade Remedy from 6.3 to 7.0
- Trained Staff on ITIL
- Selected ITIL Process Owners

- September '10 Finalize all ISO 20K Processes (Policy, Process, Procedures)
- SLAs Established for Core Services,
- October '10 Service Manager hired
- CISP Established



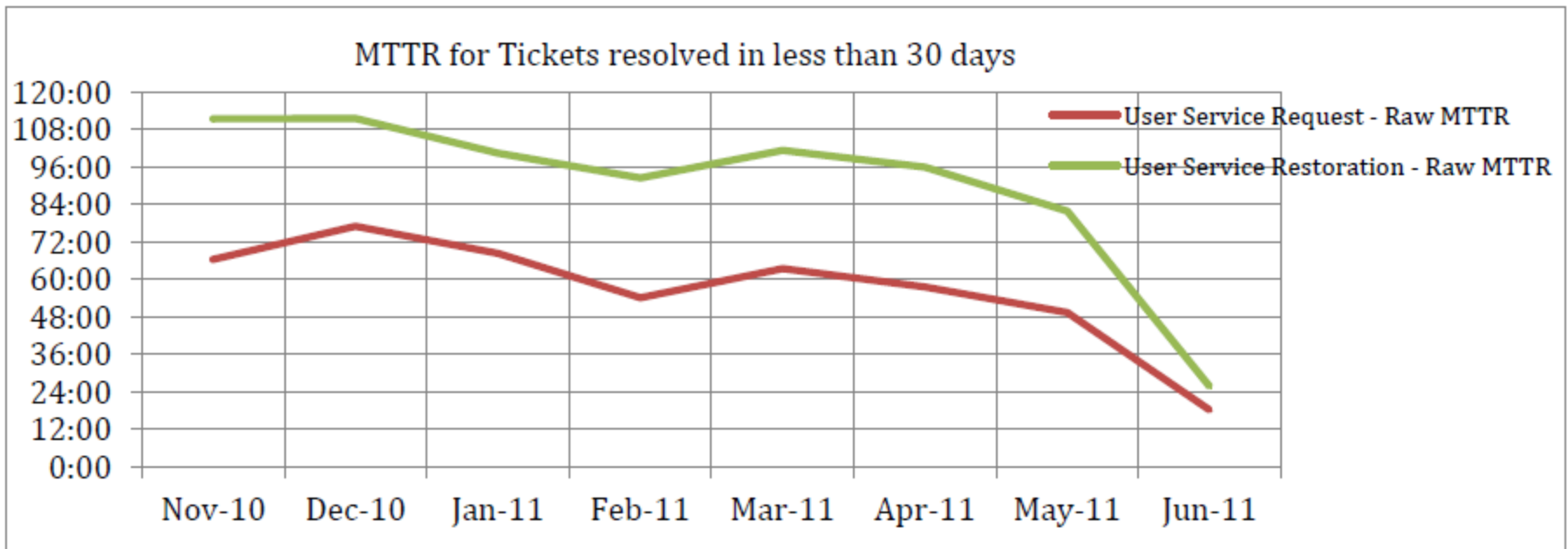
Service Management at Fermilab



Benefits to Date

Cost reduction and increased efficiency

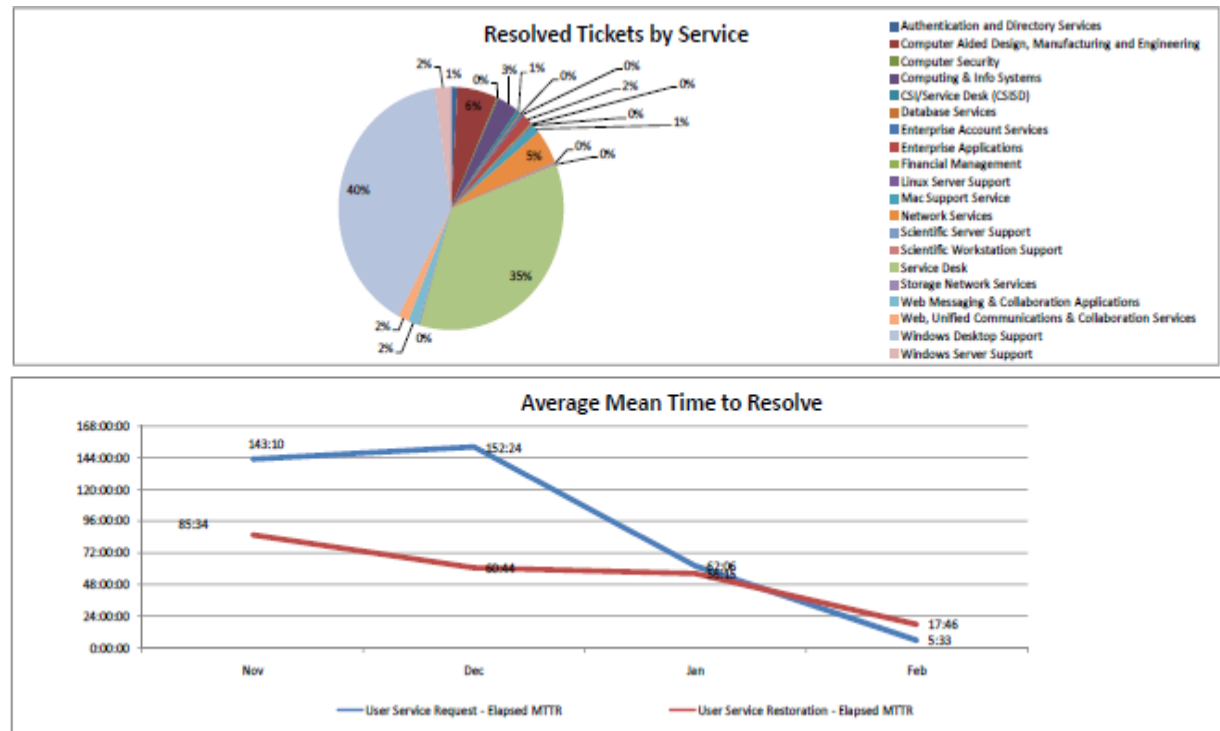
- Resources have been consolidated and centralized
- Incident Management process is standardized and measurable
- Problem Management process is part of the culture, and has contributed to resolutions
- Service Desk usage has become adopted by lab community to report incidents and make requests



Benefits to Date

Service improvement

- Developed Service Level Agreements, integrated with MOU process.
- Change and Release Management is growing in adoption and effectiveness
- Business Relationship Management has been established with lab stakeholders
- Process & Service Improvement (CSIP) projects continue
- Creating a culture of change



Remaining Challenges

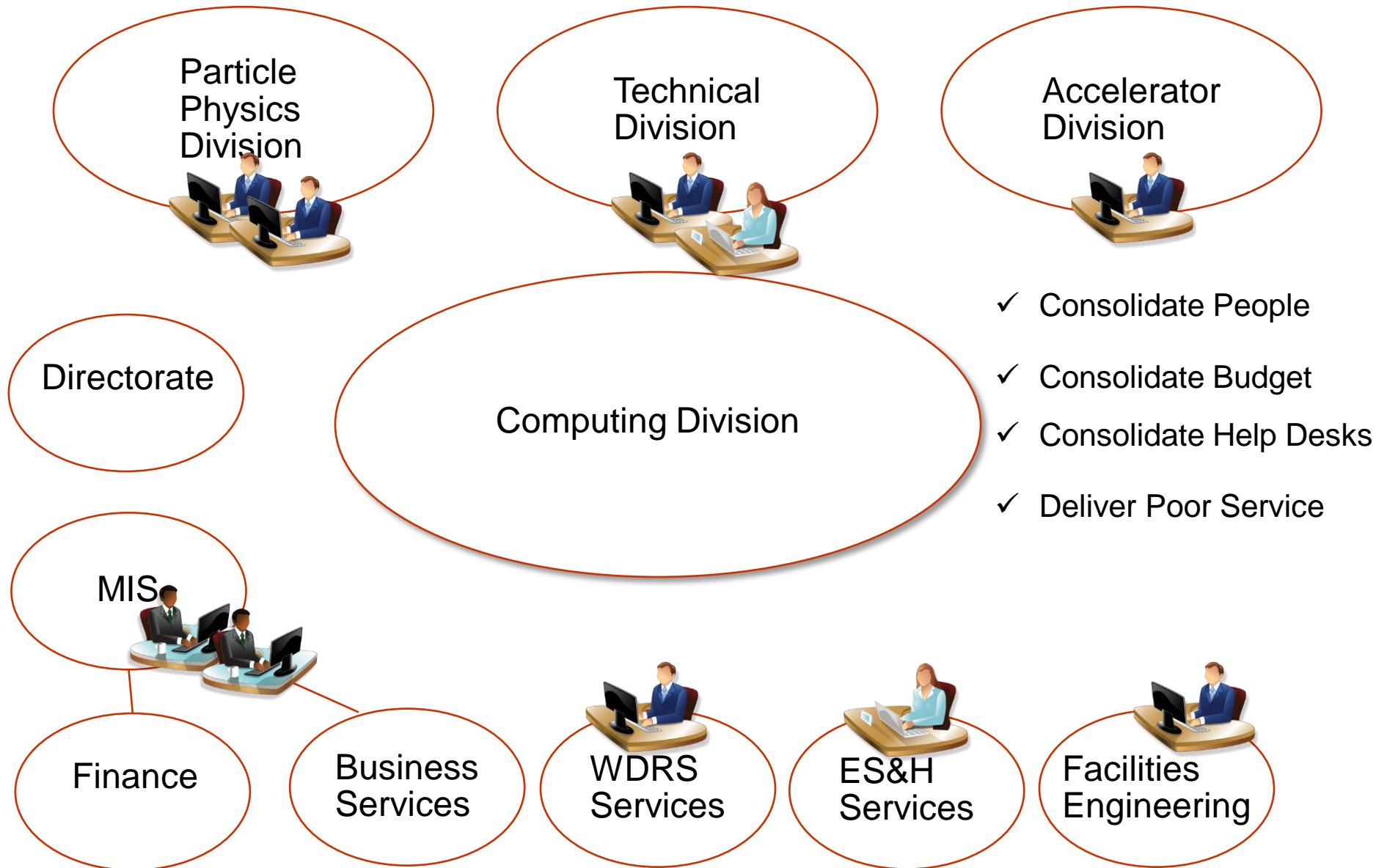
- Service Catalog was created, but never published electronically
- Service Request module was never implemented in Remedy
- IT Assets are loaded and managed through Remedy, but no Configuration Management relationships are managed
- Service Reporting and Metrics have only recently been established, and remain resource intensive and limited
- Adoption of Service Design processes remains uneven

ISO 20K Certification has been delayed until sometime in 2012.

Lesson Learned

- The double edged sword of consolidation
- Calibrating the tool for end-user value and impact
- Designing processes for consumption and growth...not perfection

The Double-Edged Sword of Consolidation



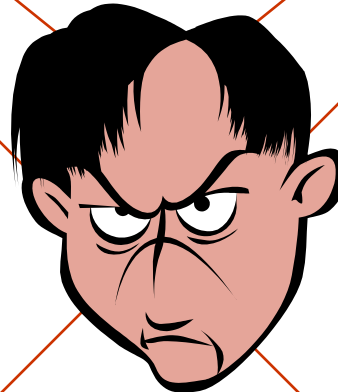
The Double-Edged Sword of Consolidation

Challenges

- New/Unfamiliar Toolset
- New/Unfamiliar Working Relationships
- New/Unfamiliar Processes and Procedures
- New/Unfamiliar Values and Success Factors

Advantages

- Reduces cost
- Efficiencies through Scalability
- Processes and Procedures can be standardized
- Strategic operational and operational mandate can drive change
- Timeline can be predictable
- Training and Communication can be formalized



Tool Challenges

- Users were comfortable with previous version of Remedy or their local help desk
- Previous tool highly customized
- Undocumented integrations had to be rebuilt or redesigned
- Undocumented support processes were discovered during tool implementation
- Upgraded tool had a complex user interface.

Calibrating the tool for end-user value and impact

- **Focus on end-user experience:** Remedy implementation did not have request module or self service – so the usual quick wins were not realized. Lead with Incident, Service Request and Service Catalog – as these focus on the end user.
- **Build it Simple:** Consolidating on a new tool AND a new process is an extreme challenge. Get something working and validated by end-users and go through some cycles of learning before bringing new users or organizations on-board.
- **Use Examples of Best Practices:** Find examples of tools, workflows and user interfaces that are well received in the user community or in the marketplace – adopt and integrate.

Calibrating the tool for end-user value and impact

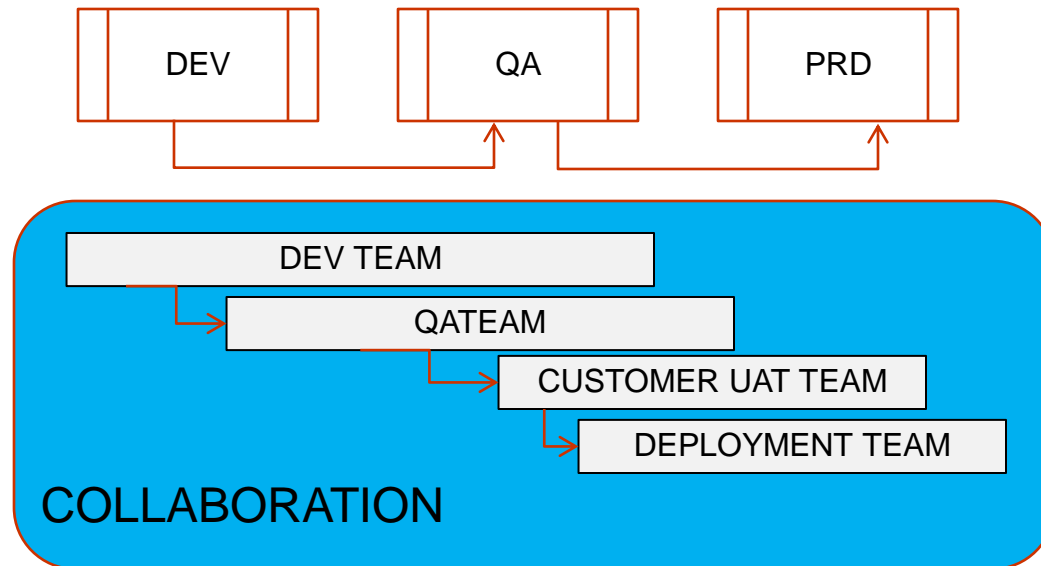
- **Deliver Value:** Try to provide some obvious value through the new tool and process (e.g. automating employee onboarding workflow). Try to have some positive impact on either the end users or the service providers.
- **Deliver Information:** Don't save reporting until the end. Begin designing reporting and metrics based upon the documented processes as soon as possible in the project. Build dashboards if possible – so the benefits of consolidation and centralization can be made apparent to management.

Designing processes for growth...not perfection

- Keep it Simple. The Change and Release Management processes were over-engineered. This caused tremendous resistance and sometimes confusion.
- Don't allow too much interpretation of ITIL / ISO standards. In addition to Major/Minor/Standard change types, the category of “**WORK**” was introduced as something that did not need to be managed. This is an element we are still trying to engineer out of the documented process. ...stick to the standard.

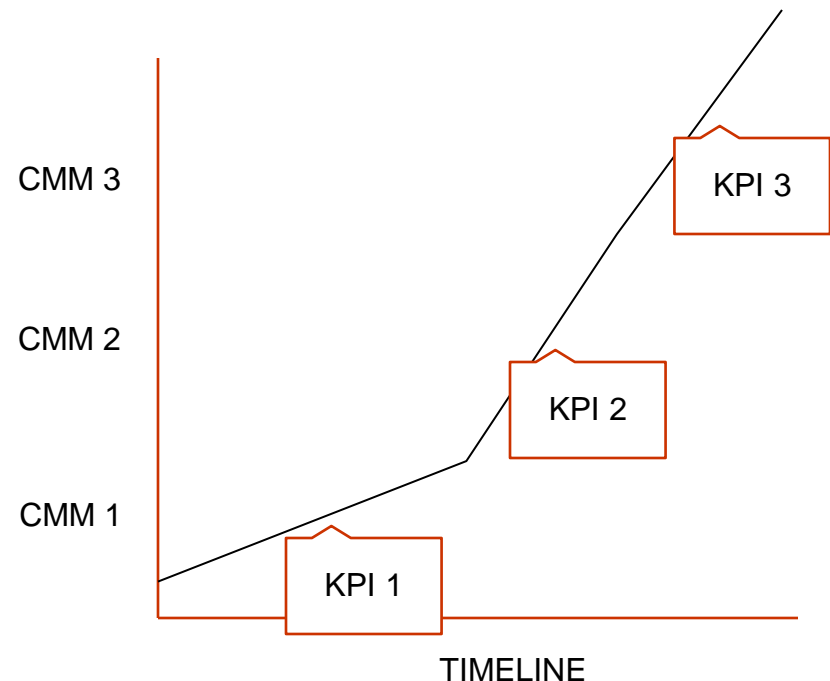
Designing processes for growth...not perfection

- Don't recreate processes, but try to integrate into existing processes and tools – especially for Release Management. Try to avoid the 11th hour repurposing of information – and try to capture it in the native collaboration, workflow and native best practices.



Designing processes for growth...not perfection

- Find a balance between an managed and measured process, and what the service provider/owner can consume. Make SLA simple and evolve them over time. The SLAs originally designed were correct – but overwhelmed many service providers.
- Designing processes for growth...design very basic metrics to start with, but also establish KPIs that represent thresholds in maturity and quality that can be targeted

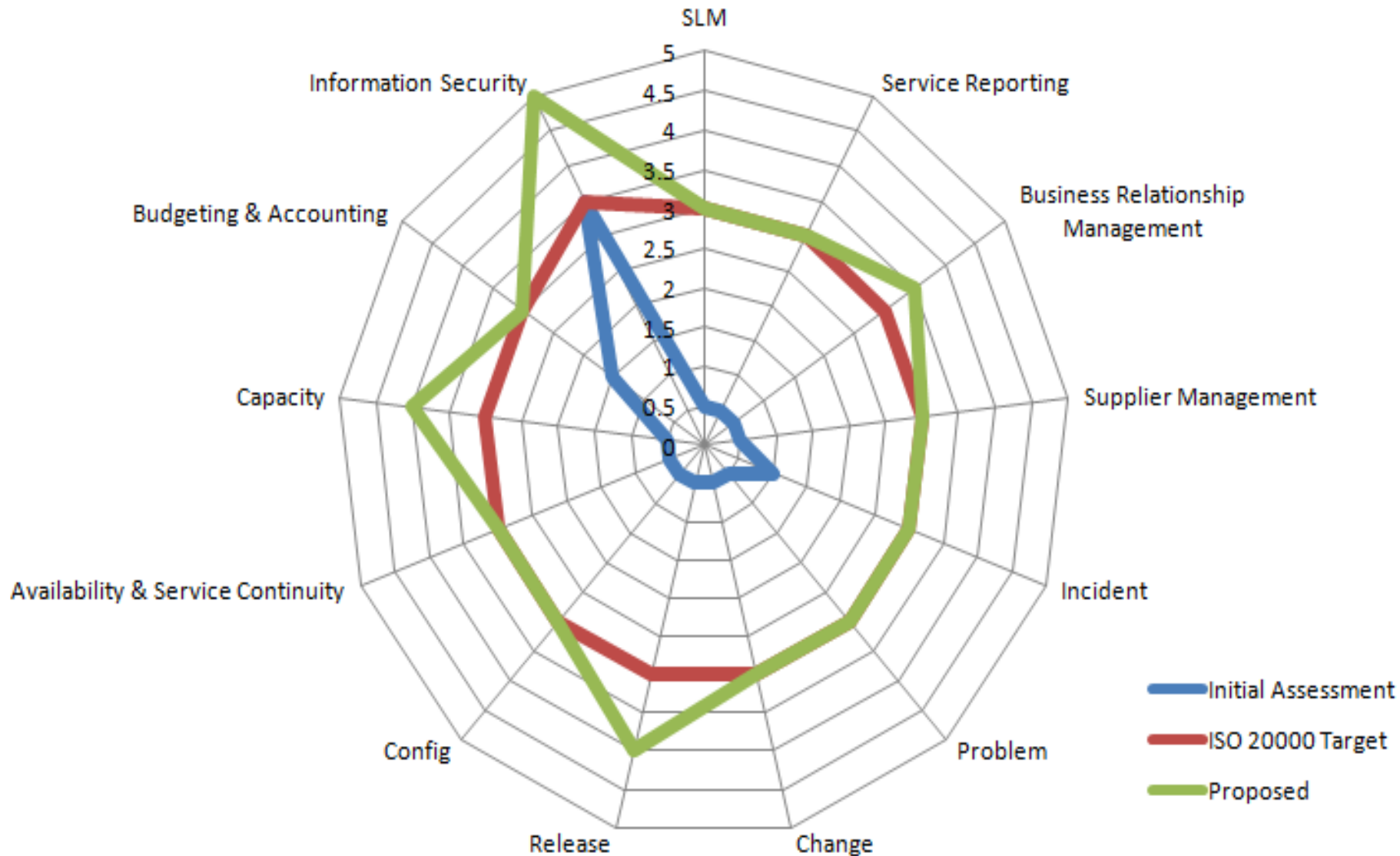


The Light at the End of the ISO 20K Tunnel



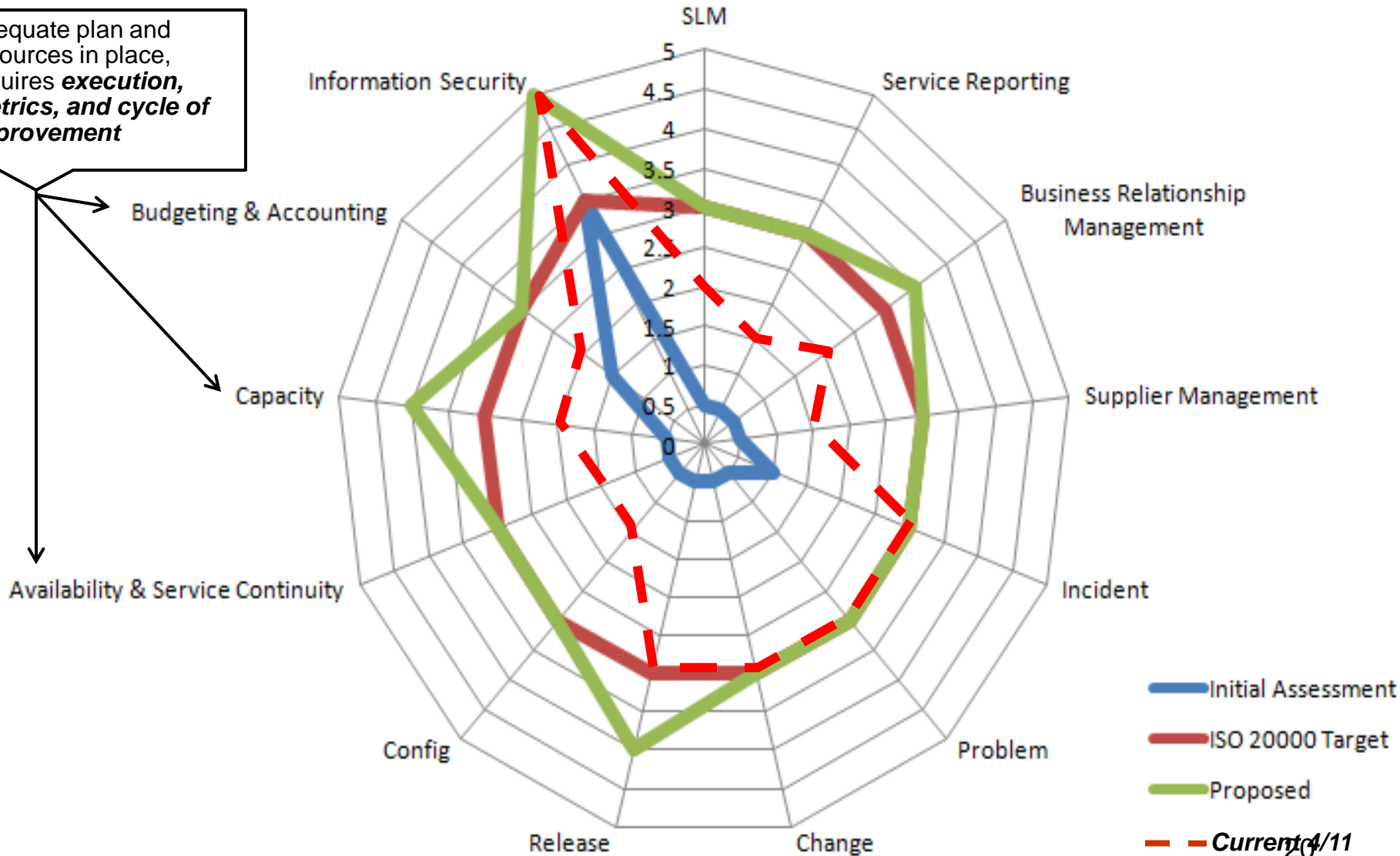
How do we get there from here?

Desired State of Process Capability & Maturity

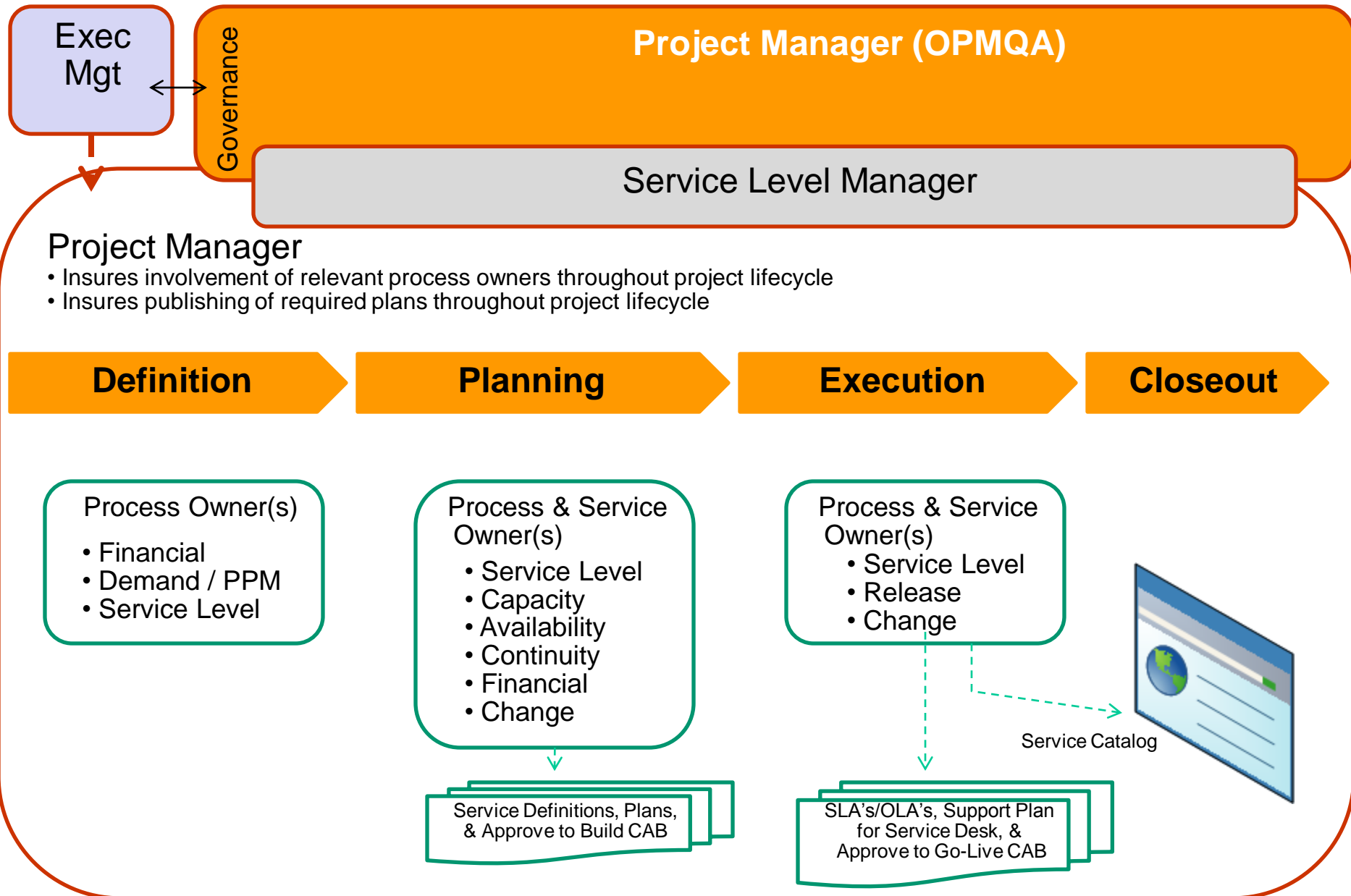


Current “Thumbnail” Assessment

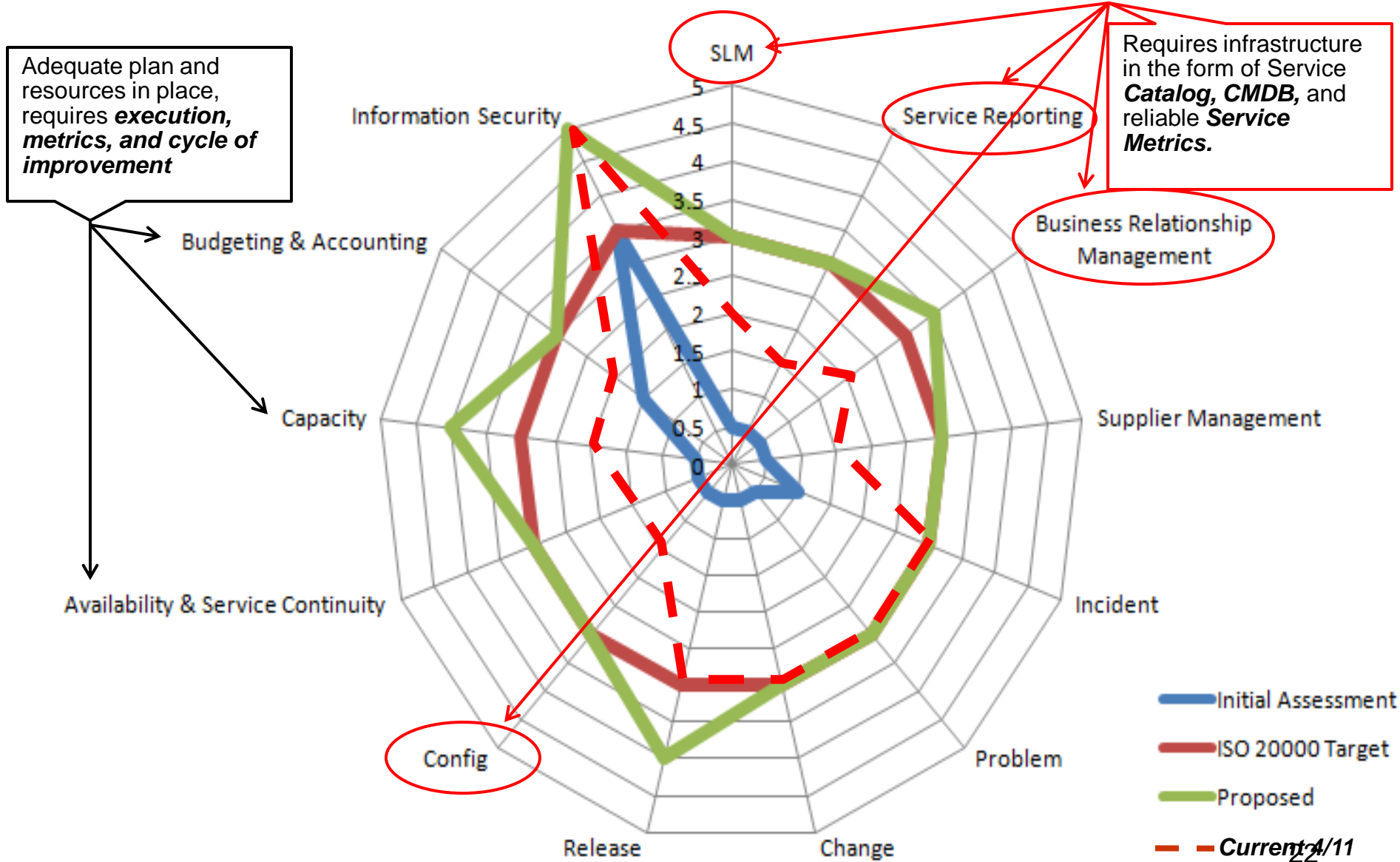
Adequate plan and resources in place, requires **execution, metrics, and cycle of improvement**



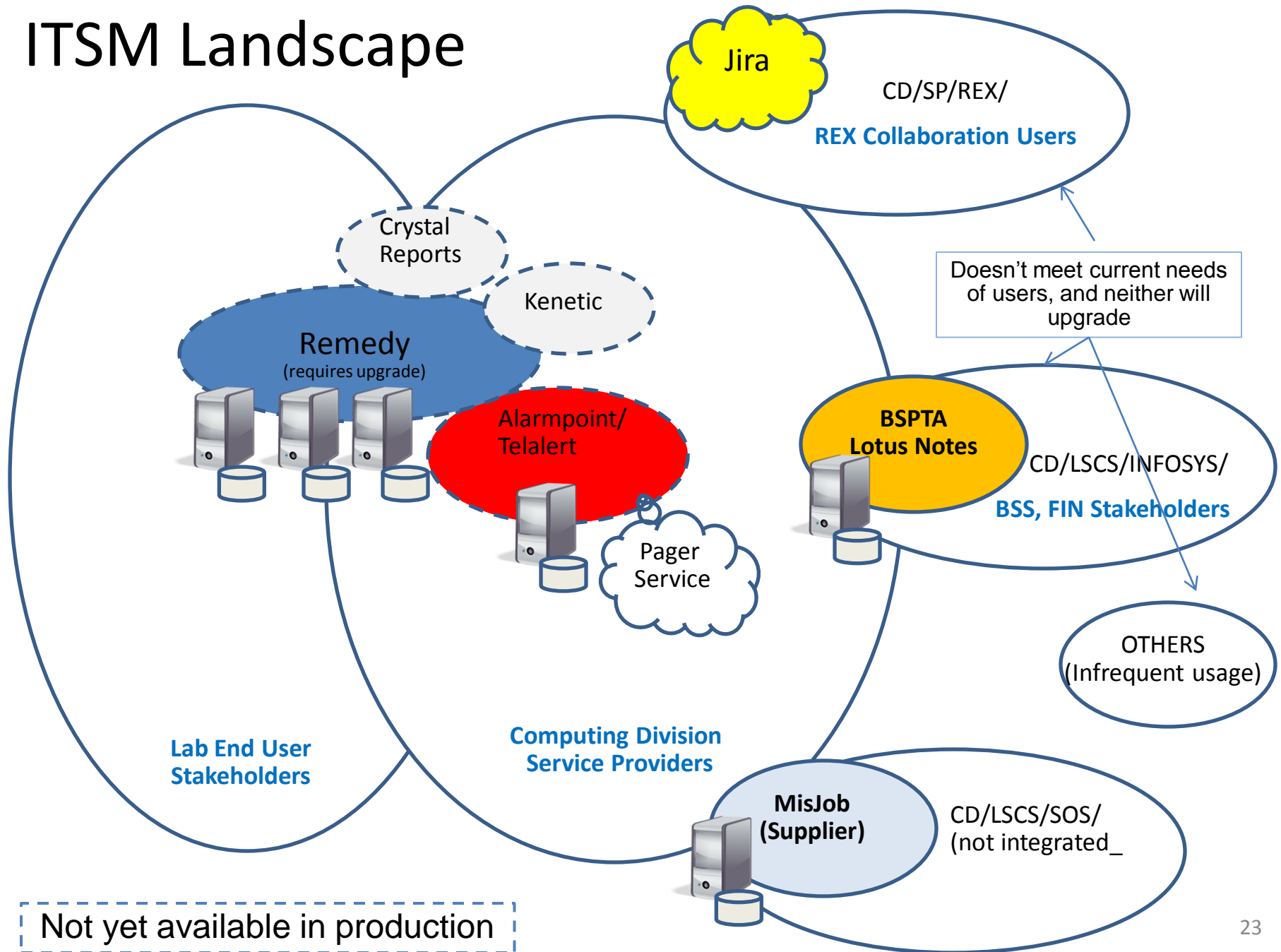
ISO 20K Service Design Integration



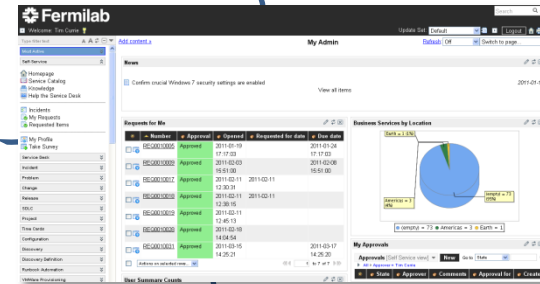
Current “Thumbnail” Assessment



ITSM Landscape



Service-Now

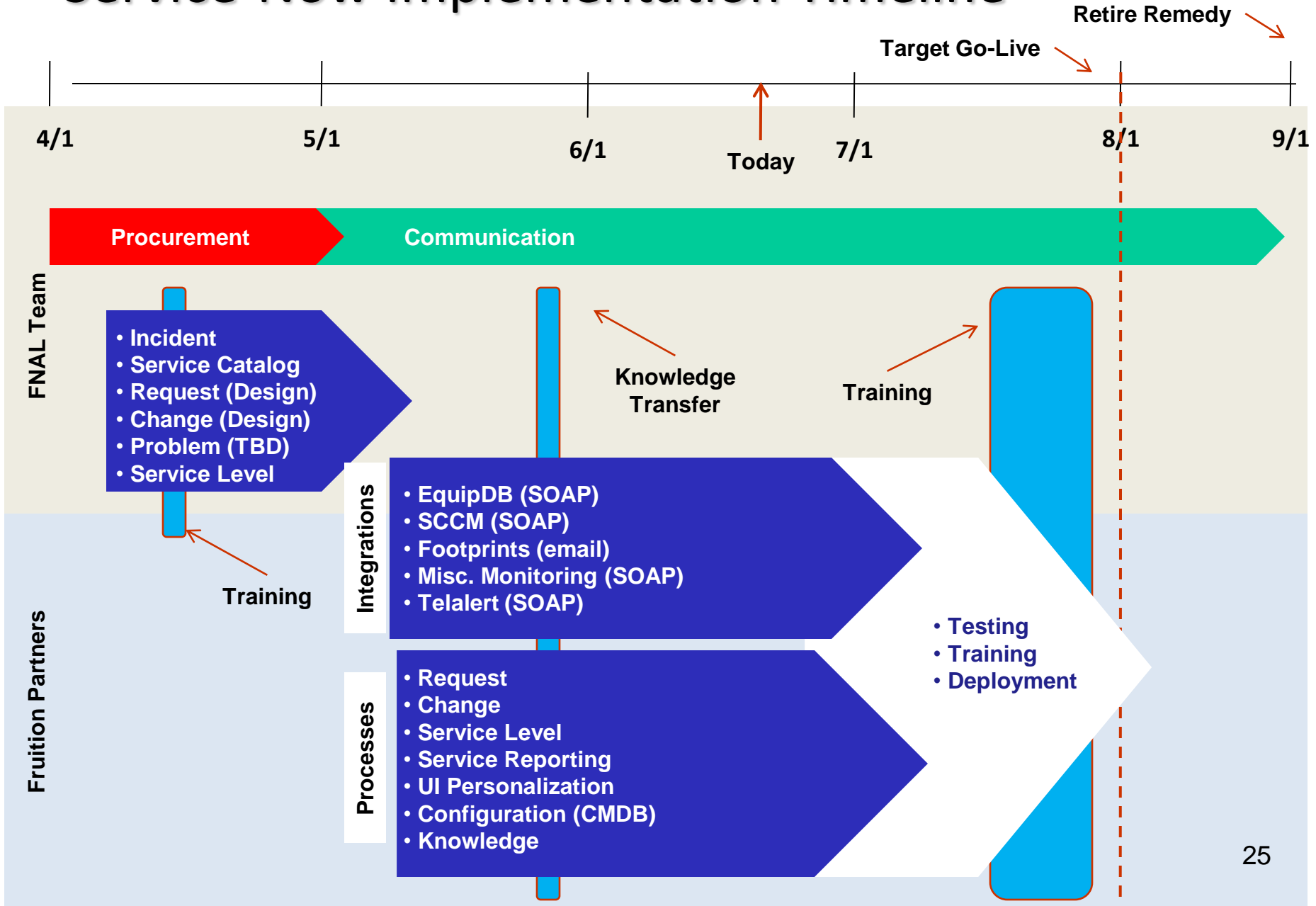


Lab End User Stakeholders

Computing & Service Proc

- Improve UI & enable personalization
- Improve delivery of self-service
- Accelerate delivery of request workflows
- Reduce costs and support risks
- Accelerate delivery of the CMDB
- Enable Service Reporting and Metrics
- Increase adoption from Scientific Computing stakeholders

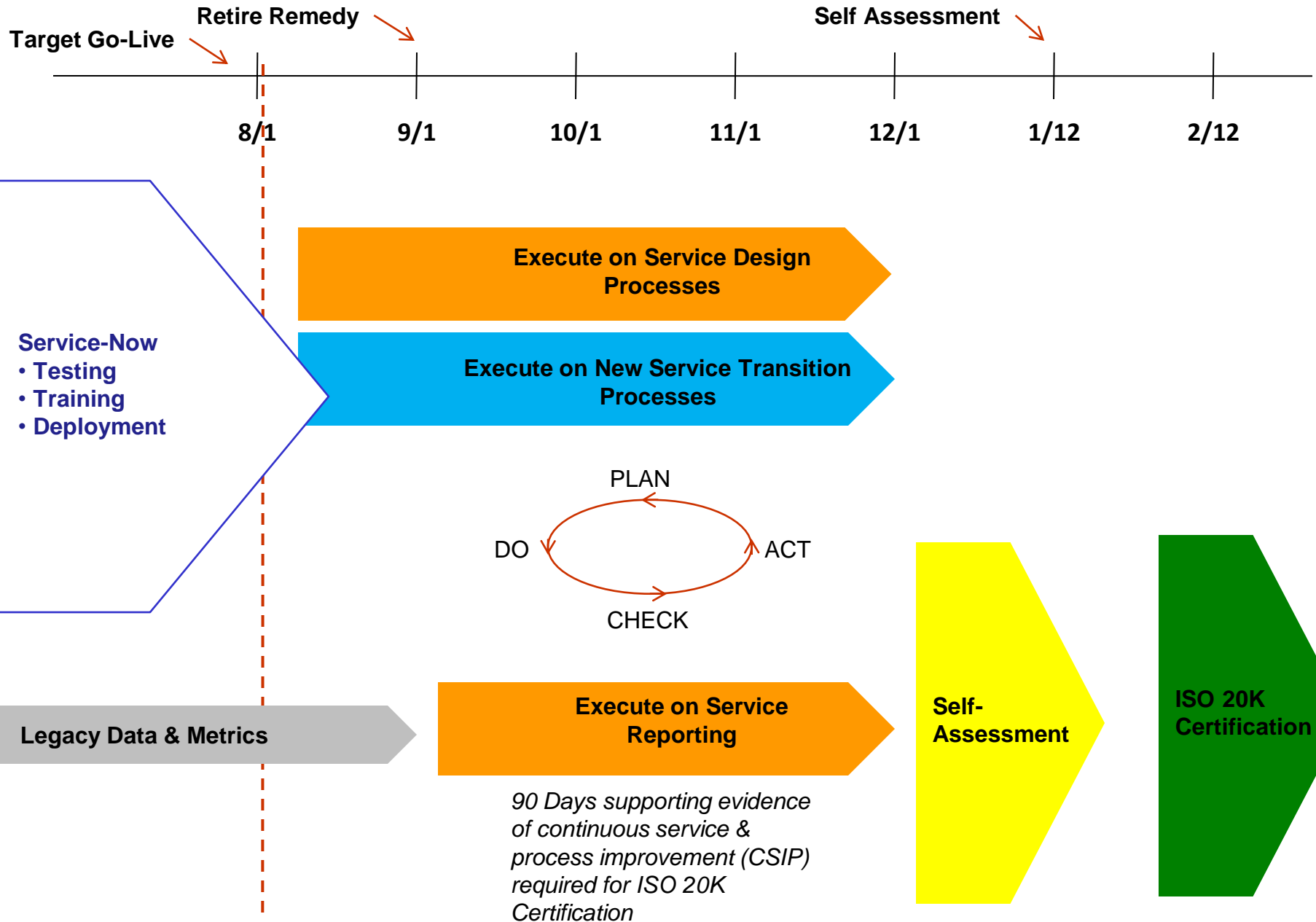
Service-Now Implementation Timeline



The Light at the End of the ISO 20K Tunnel

- Service Design Processes
 - Policy, Process, and Procedures and Owners Established
 - Integration with OPMQA processes will help insure engagement
 - Just need to execute
- Service Reporting, Catalog, & CMDB
 - New tool will enable Service Catalog, CMDB, and Service Reporting
 - Delivering on Metrics and KPIs will fulfill ISO 20K requirements
- New Target Date for Certification: Early 2012

ISO 20K Certification Timeline



Questions?

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